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NAME GRABBER™
User Manual

Abstract

This document contains work instructions related to utilizing the integration application, Name Grabber™ Version 2.1 Build 10 or above.

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1 INTRODUCTION

1.1 Overview

Name Grabber™ is a bridging application located in the Windows System Tray that understands how to bridge patients from a Practice Management (PM) application to Apteryx Imaging (XrayVision® or XVLite™). Name Grabber™ works with most third-party PM applications.

For example, if you have patient "John Doe" open in your PM application and then click on the icon in the system tray: Name Grabber™ will automatically open that patient in Apteryx Imaging. Using Name Grabber™, the cumbersome and time consuming practice of manually starting applications, finding a specific patient and then opening that patient is automated with a single click of the mouse.

1.2 Invoking Name Grabber™

The Name Grabber™ application is invoked by single-clicking on the icon in the system tray with your left mouse button. Once this icon is clicked, Name Grabber™ will search for any open patients, and if found Name Grabber™ will then open that patient in XrayVision® or XVLite™.

2 INITIAL SETUP

2.1 Overview

After installation, Name Grabber™ simply has to be run, which places the Name Grabber™ icon in the system tray, indicating the application is ready to use.

Name Grabber™ 2.1 build 10 adds the ability to bridge patient information through Remote Access Protocol (RDP) sessions. Refer to Appendix B: Operability in a Remote Desktop Environment for additional information including basic setup and use information.

2.2 Start Automatically

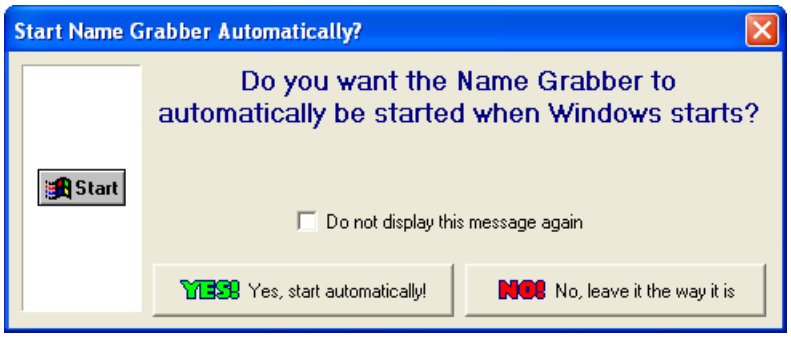
When this option is enabled, Name Grabber™ will automatically be started when the computer starts. If this option is disabled, then the Name Grabber™ application will have to be manually started by the user when they want to use it.

The first time the program is launched, users will be prompted to enable or disable this option.

To add Name Grabber™ to the Startup Group:

2.2.1 Double-click on NameGrabber.exe

2.2.2 The 'Start Name Grabber Automatically?' window appears


Start Name Grabber Automatically?
Do you want the Name Grabber to automatically be started when Windows starts?
Start
Do not display this message again
YES! Yes, start automatically!
NO! No, leave it the way it is

2.2.3 To ensure that Name Grabber™ starts automatically, click **Yes Start Automatically!**

2.2.4 Name Grabber™ will now start automatically each time Windows starts.

This option can also be accessed by right-clicking on the Name Grabber™ icon in the system tray, selecting **Options** and then enabling or disabling the **Start automatically when Windows starts** option.

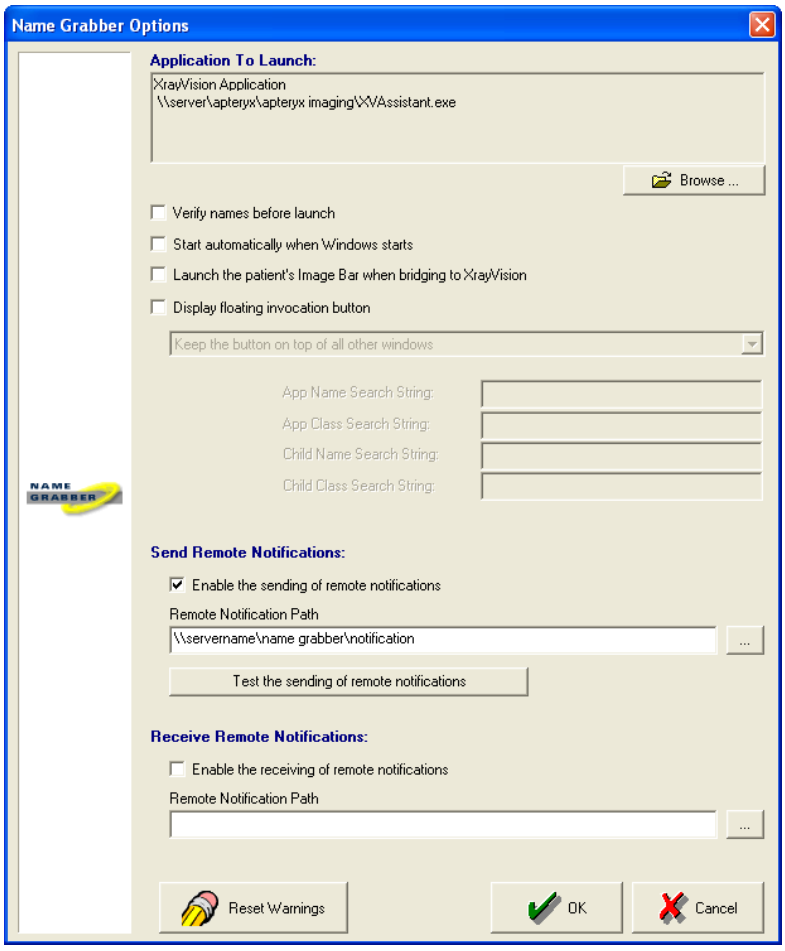
3 PREFERENCES

3.1 Overview

The Name Grabber™ menu can be accessed by right-clicking on the Name Grabber™ icon located in the system tray. The Name Grabber™ menu, seen below, provides several tools and utilities that allow users to manually launch patients, manage launched applications, edit application sniffer definitions, as well as modify Name Grabber™ invocation settings.

3.2 Options

Name Grabber™ Options controls how the interface and application perform.



3.2.1 **Application to Launch** – Name Grabber™ is typically installed when XrayVision is installed and resides in the same installation directory. By default, Name Grabber is configured to run XrayVision's executable file ***XVAssistant.exe*** that resides in the same install directory. To launch XVLite™ instead, select the **Browse** button and navigate to the install directory and select ***XVLite.exe***.

3.2.2 **Verify Names Before launch** - When this option is enabled, Name Grabber™ will display a Verify Patient dialog displaying the extracted patient's information. This dialog is displayed when the user left clicks on the NG icon in the system tray.

Depending on your office's setup, the **Verify Names Before Launch** option may violate HIPAA regulations regarding the display of sensitive patient information. Before enabling this option, you should determine if the HIPAA regulations pertain to your particular implementation.

3.2.3 **Start Automatically when Windows Starts** - When this option is enabled, Name Grabber™ will automatically be started when the computer starts. If this option is disabled, then the Name Grabber™ application will have to be manually started by the user when they want to use it.

3.2.4 **Launch the patient's Image Bar when bridging to XrayVision** – When this option is enabled and a patient that already has images is bridged, the patient's record will be opened in XrayVision and the floating image bar feature will be invoked, display all the patient's images.

3.2.5 **Display floating invocation button** - A floating Name Grabber™ icon can be enabled, allowing users to click and bridge using a floating button rather than the icon located in the system tray.

- **Display as standard window** - This option allows a floating button to be placed on the desktop. It will no
- **Keep the button on top of other windows** - This option functions the same as the one listed above, but the floating icon will be kept above all other windows on the desktop so it does not get 'lost'.
- **Marry the button to a specific application** - This option allows the Name Grabber™ floating icon to be married to another window. For example, the floating Name Grabber™ icon can be married to the practice management application so any time the practice management window is displayed, the button will also appear. (See below for instructions.)

To marrying a button to an application:

3.2.5.1 Access Name Grabber™ Options and select the **Display floating invocation button** option.

3.2.5.2 From the dropdown menu, select **Marry the button to a specific application**.

3.2.5.3 Drag the icon over the title bar of the window which the floating Name Grabber™ icon will be married to.

This action defines the application window that will be used to marry the Name Grabber™ icon. Any time this window is opened, the floating icon will appear.

3.2.5.4 Click **OK**.

3.2.6 **Send/Receive Remote Notifications** – Name Grabber™ 2.1 build 10 adds the ability to bridge patient information through Remote Desktop Protocol (RDP) sessions. For more information, refer to Appendix B: Operability in Remote Access Environments for more information..

3.2.7 **Reset Warnings** - The reset warnings button may be used to reset all warnings issued by Name Grabber™ for which the user selected the **Do not display this message again** option.

3.3 Technical Support

If answers are not found in the help guide, the Technical Support menu provides the phone number and email address for Apteryx Technical Support.

3.4 Web Links

Using the Web Links option, users can navigate to the Apteryx home page, or to our downloads page where all new updates can be downloaded free of charge.

3.5 About

Click **About** to display a scrolling window containing Name Grabber™ version and build number information. Additionally, Trademark, Patent, and Registration information is also displayed.

3.6 Exit

Clicking **Exit** will close Name Grabber™.

4 CUSTOMIZATION REQUEST

4.1 Overview

At first, Name Grabber™ may not have the capability to detect the patient name from your practice management software automatically. If Name Grabber™ does not support your practice management software, and you do not wish to make the customization yourself by adding an Application Sniffer entry, please contact Apteryx Support.

Our support staff can remotely login to your computer, and modify Name Grabber™ to properly bridge patient information from your practice management software.

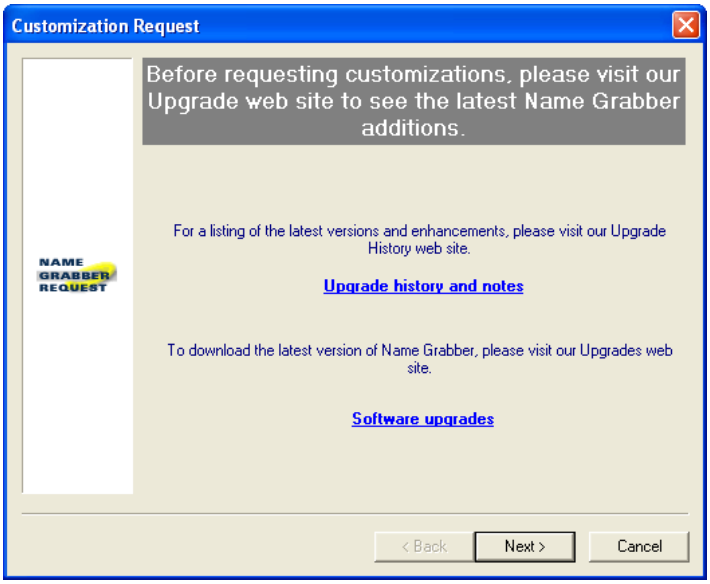
Alternatively, you may submit a customization request. To submit a customization request, right-click on the icon, and select ***Customize > Customization Request*** the menu options.

4.2 Creating a Customization Request

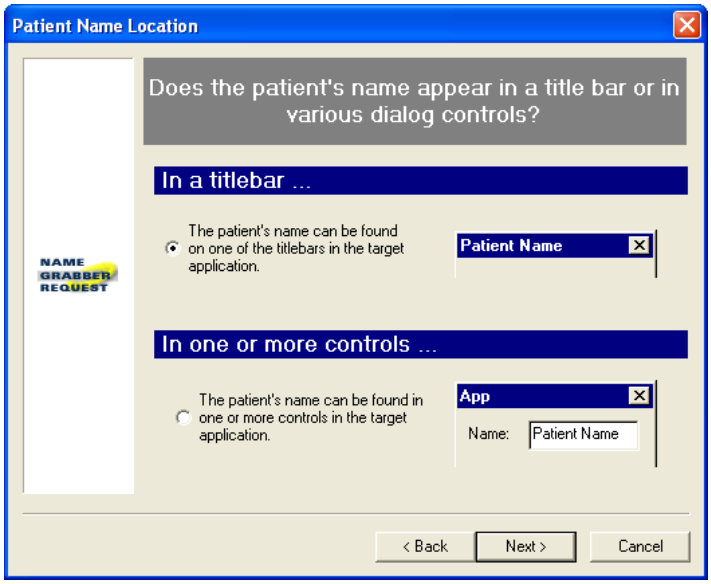
4.2.1 Right-click on the Name Grabber™ ( ) icon in the system tray.

4.2.2 Select the ***Customize > Customization Request*** Customization Request.

4.2.3 The Customization Request window appears. Click **Next** if the Apteryx website does not contain an update containing your request.


Customization Request
Before requesting customizations, please visit our Upgrade web site to see the latest Name Grabber additions.
NAME GRABBER REQUEST
For a listing of the latest versions and enhancements, please visit our Upgrade History web site.
Upgrade history and notes
To download the latest version of Name Grabber, please visit our Upgrades web site.
Software upgrades
< Back
Next >
Cancel

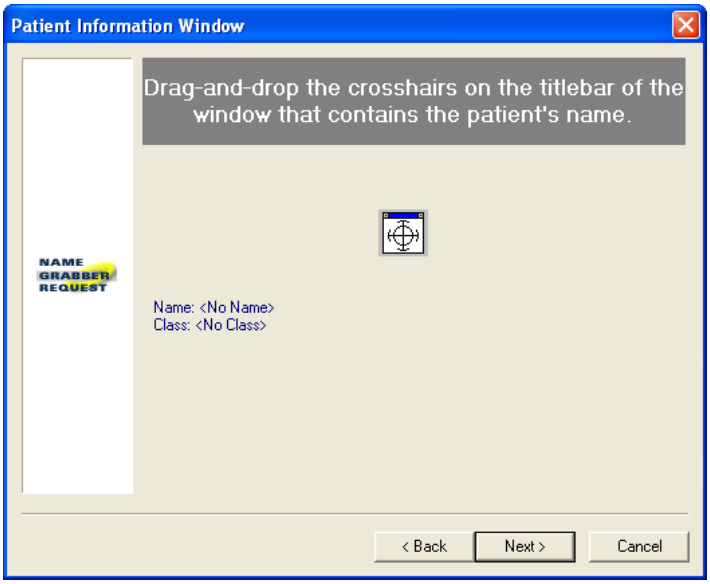
4.2.4 The Patient Name Location Window appears.


Patient Name Location
Does the patient's name appear in a title bar or in various dialog controls?
In a titlebar ...
The patient's name can be found on one of the titlebars in the target application.
Patient Name
NAME GRABBER REQUEST
In one or more controls ...
The patient's name can be found in one or more controls in the target application.
App
Name:
Patient Name
< Back
Next >
Cancel

4.2.4.1 If the patient's name appears in the Title Bar of the practice management application, select the radio button under 'In a titlebar'.

4.2.4.2 If the patient's name appears in other locations in the practice management application, select the radio button under 'In one or more controls'.

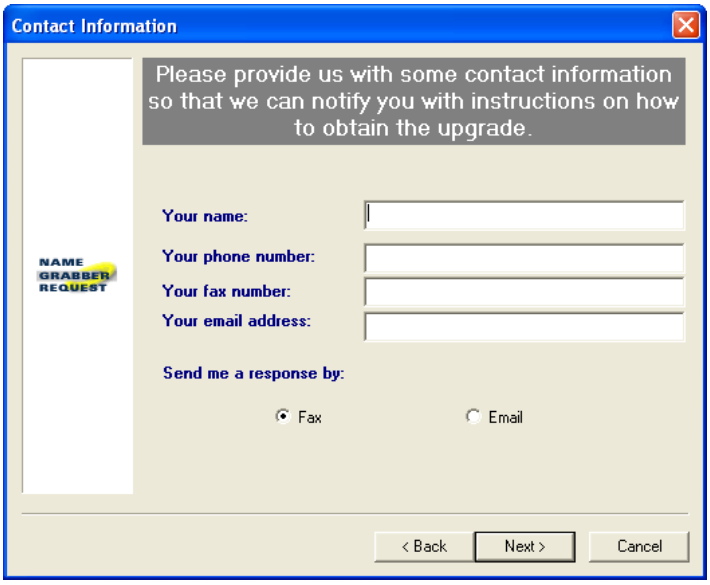
4.2.5 The 'Patient Information Window' appears.



4.2.5.1 Drag the crosshair icon onto title bar of the window containing patient information.

4.2.5.2 Click **Next**.

4.2.6 The Contact Information window appears.

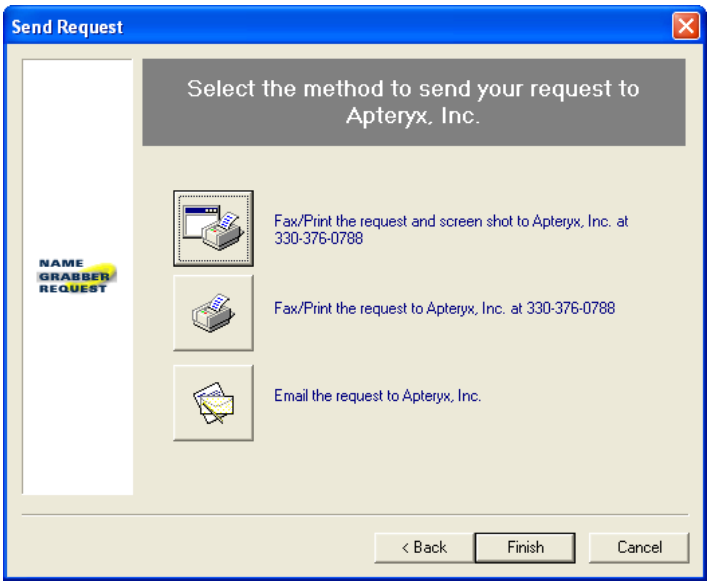

Contact Information
Please provide us with some contact information so that we can notify you with instructions on how to obtain the upgrade.
NAME GRABBER REQUEST
Your name:
Your phone number:
Your fax number:
Your email address:
Send me a response by:
Fax
Email
< Back
Next >
Cancel

4.2.6.1 Enter your information so that Apteryx, Inc. can notify you when the request has been completed.

4.2.6.2 Select a response method (**Fax/Email**).

4.2.6.3 Click **Next**.

4.2.7 Select a method to send the request to Apteryx, Inc.


Send Request
Select the method to send your request to Apteryx, Inc.
NAME GRABBER REQUEST
Fax/Print the request and screen shot to Apteryx, Inc. at 330-376-0788
Fax/Print the request to Apteryx, Inc. at 330-376-0788
Email the request to Apteryx, Inc.
< Back
Finish
Cancel

- **Fax/Print the request and screen shot …** - Select this option to send the request to a printer with a screenshot of the target application. If printed to a printer, Apteryx's fax number is printed directly on the printout.
- **Fax/Print the request … -** Select this option to send the request to a printer or directly to a fax driver. If printed to a printer, Apteryx's fax number is printed directly on the printout.
- **Email the request … -** Select this option to send the request to Apteryx via email. Emailing requires that MAPI is set up on your computer (if you use one of the Microsoft Outlook applications, it will be). If MAPI is not set up on your computer, you will be prompted to do so.

Sending a cover page is not necessary when faxing requests to Apteryx, Inc.

4.2.8 Click **Finish** to complete the customization request.

5 DATA DRILLS

5.1 Overview

Name Grabber™ is typically used in conjuction with PM-Specific DataDrills that are installed with XrayVision® or XVLite™. When Name Grabber™ passes patient information, the imaging application utilizes the DataDrill to extract additional patient demographic information directly from the PM database. It then uses the information from the practice management database to create a patient record.

Although Name Grabber can operate without a DataDrill to simply grab basic patient information, (such as firstname and lastname) from a PM interface, this information on its own may not uniquely identify the patient. For example, more than one patient in a PM application may share the common name “John Smith”. DataDrills are required to query the PM database and fill in any unique information (such as patient ID and birthdate) that Name Grabber alone cannot obtain. The DataDrill in XrayVision/XVLite can retrieve this unique information directly from the practice management's database or memory.

On occasion, there may be a case where a DataDrill does not exist for your practice management software. Should a DataDrill not exist, please contact Apteryx Support. Our support staff can remotely login to the system and review the practice management software to determine if a DataDrill is necessary and what files are needed in order to produce one.

5.2 Adding/Updating DataDrills in Apteryx Imaging

Apteryx is also continually adding support for new practice management versions, which may require updating Name Grabber™ and any relevant DataDrills.

DataDrills may be added to XrayVision or XVLite either by using the Apteryx Imaging installation CD (through the standard Windows Modify option) or by running the appropriate upgrader from the Apteryx Product Updates site.

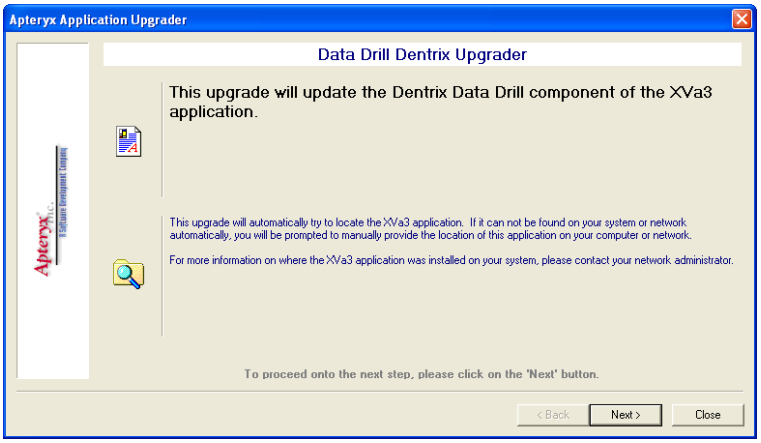
To download and install/upgrade DataDrills:

5.2.1 Close every instance of XrayVision/XVLite running on any server/workstation on the network.

5.2.2 Access the Apteryx Product Updates Site.

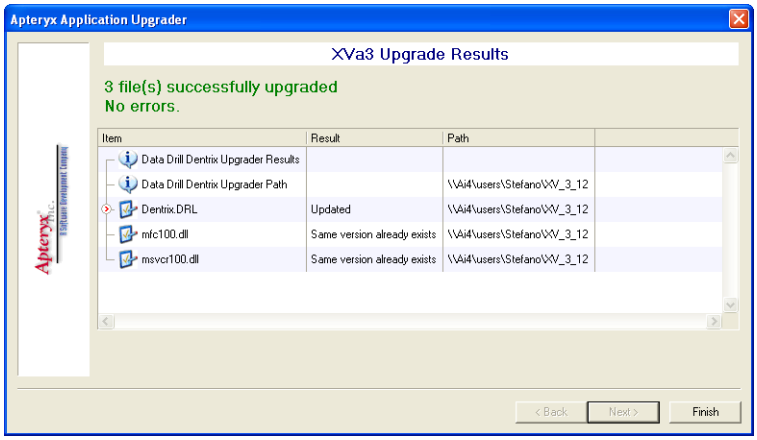
5.2.3 Expand the ‘Name Grabber™ and DataDrill Updates’ section and click on the link corresponding to the practice management software to download the appropriate DataDrill.

5.2.4 Run the DataDrill upgrader. The application updater wizard displays. Click **Next**.


Apteryx Application Upgrader
Data Drill Dentrix Upgrader
This upgrade will update the Dentrix Data Drill component of the XVa3 application.
This upgrade will automatically try to locate the XVa3 application. If it can not be found on your system or network automatically, you will be prompted to manually provide the location of this application on your computer or network.
For more information on where the XVa3 application was installed on your system, please contact your network administrator.
To proceed onto the next step, please click on the 'Next' button.
< Back
Next >
Close

If XrayVision/XVLite is still running, a warning message will appear indicating that the application MUST be closed before the upgrader can be run.

5.2.5 The DataDrill Upgrader installs or updates all the necessary DataDrill and support files for XrayVision/XVLite.



5.2.6 Click **Finish**.

5.3 Configuring DataDrill Options

DataDrill options allow users to specify where databases can be located on your network, but also various options such as database caching that can be used to improve the performance of data retrieval.

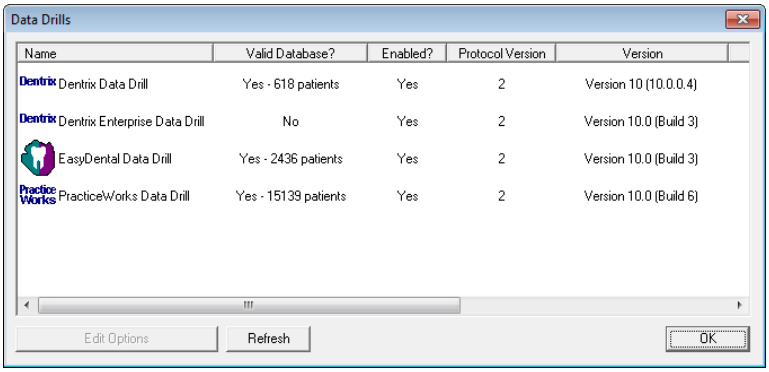
To access and configuring DataDrill Options in XrayVision or XVLite:

5.3.1 Launch the imaging application (XrayVision/XVLite).

5.3.2 **XrayVision®:** Select ***Database > DataDrills > DataDrill Options***.

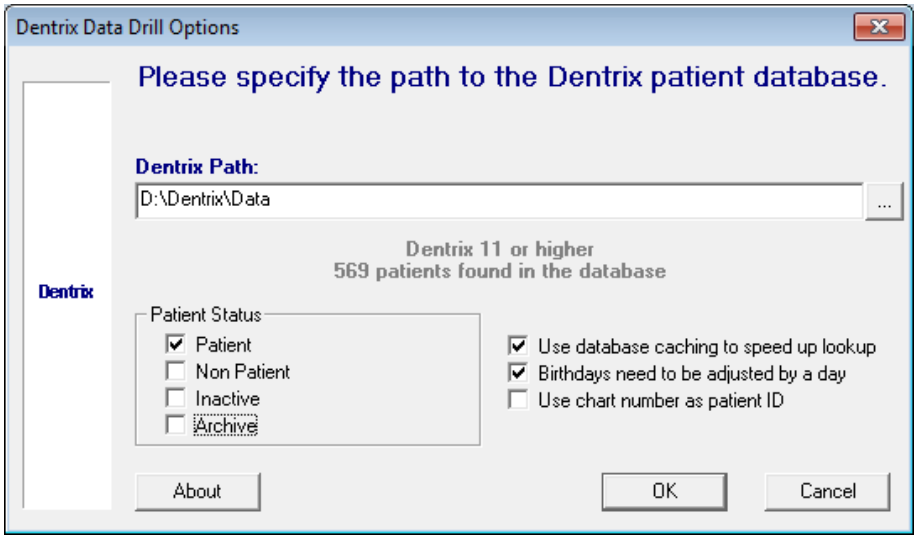
XVLite™: Select Preferences > Database > DataDrill Options.

5.3.3 The 'Data Drills' window appears.



The DataDrill options display all the DataDrills currently installed with XrayVision/XVLite and whether or not they point to a valid practice management database.

5.3.4 Double-click on the Data Drill to be modified. The Data Drill Options window appears.



Each DataDrill has a different set of options depending on what type of database each one utilizes as well as what additional options are offered by the target practice management application. Some DataDrills require that each workstation specify a Windows ODBC driver to connect to the practice management database. This is typically the case if the practice management software utilizes a database engine (e.g. SQL, MS Access). Please contact Apteryx Support for assistance with this setup.

5.3.5 Click **OK** after all modifications are complete.

6 USING NAME GRABBER™ TO BRIDGE PATIENTS

6.1 Overview

Name Grabber™ and DataDrills are used in tandem to grab patient information from a practice management application and automatically open or create the patient in a third-party imaging program.

Name Grabber™ understands how to extract what patient is currently open in a third-party practice management application using Sniffer Definitions.

When launched on each workstation in a dental practice, it simply resides as an icon in the system tray (typically in the lower right-hand corner of the computer screen).

6.2 Bridging a Patient from the PM to the Apteryx Imaging

To automatically open or create a corresponding patient record in XrayVision®/XVLite™:

6.2.1 Open the patient file in the practice management application and view the window defined in a matching sniffer definition (typically a patient information or patient chart screen).

6.2.2 Click on the Name Grabber™ icon in the system tray.

6.2.3 Name Grabber™ proceeds to extract patient name (and any additional identification and demographic information, if available) from the PM application, and creates a new or opens an existing patient record in XrayVision®/XVLite™.

Patient identification and demographic information is typically extracted from the practice management database using a DataDrill. DataDrills are the main work horses when it comes to extracting patient information from practice management applications. DataDrills are the components that actually understand how to burrow into an application's database and extract the necessary patient information. Unlike Name Grabber™, DataDrills operate behind the scene unbeknownst to the user. Refer to How Name Grabber™ And DataDrills Work Together for detailed information.

6.3 How Name Grabber™ And DataDrills Work Together

6.3.1 The user clicks on the Name Grabber™ icon in the system tray.

6.3.2 Name Grabber™ checks to see which application the user is currently using and extracts as much patient information from the open application (i.e. the patient's first name and last name).

6.3.3 Name Grabber™ passes the patient name to the appropriate DataDrill installed to have it find out the patient's SSN, ID#, DOB and sex.

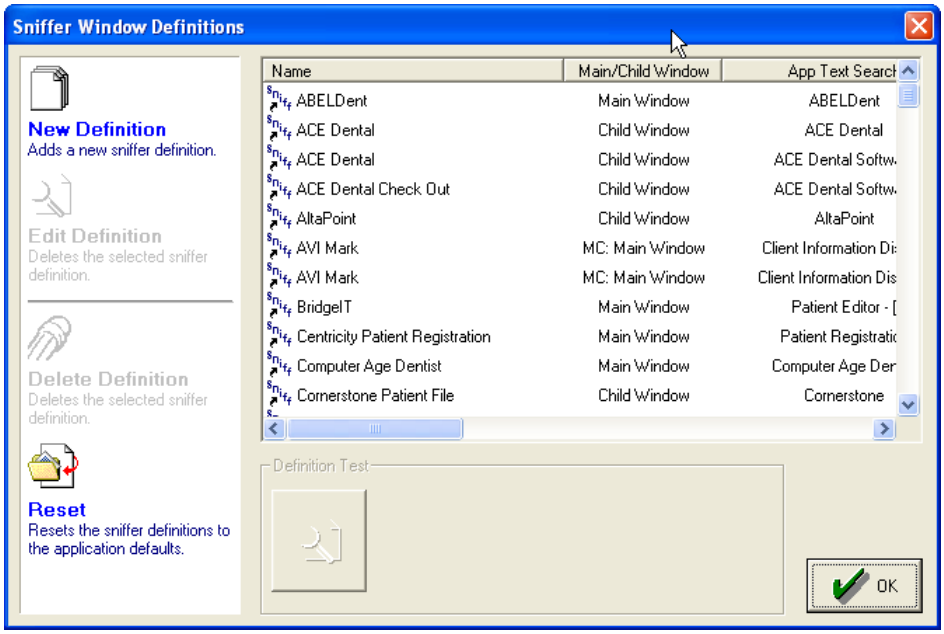
6.3.4 The DataDrill mounts the PM application's database and extracts the information and then passes it to the XrayVision®/XVLite™, automatically launching it if is not already running.

7 APPENDIX A: APPLICATION SNIFFER DEFINITIONS

7.1 Overview

Application sniffer definitions let Name Grabber™ determine exactly which practice management applications it should search for when trying to determine which patient the user is currently working with.

Name Grabber™ sniffer definitions can be accessed by right-clicking on the Name Grabber icon in the system tray and selecting ***Customize > Application Sniffer Definitions***.



Application are listed by practice management name. Each application commonly has multiple sniffer definitions that correspond with different versions and pages in the practice management interface.

In general, sniffer entries identify an application and child window to search for when tracking down patient names as well as the format that is to be used to extract out the patient information once the window has been found.

The 'Sniffer Definitions' window provides users the following functionality:

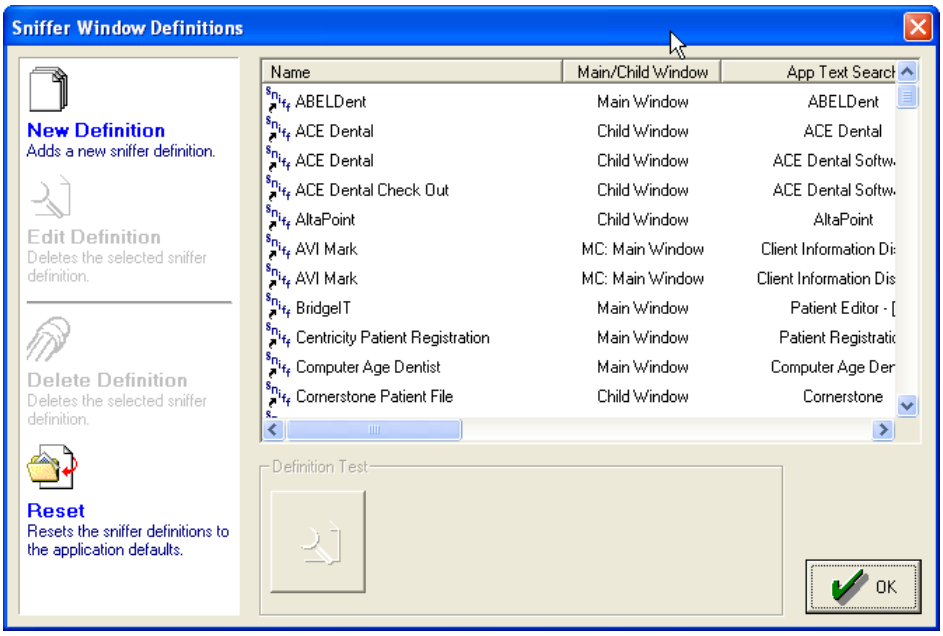
⚠ **Warning:** Apteryx recommends that you do not use these wizards directly unless you are on-line with Apteryx technical support or have had training from Apteryx in generating Application Sniffer definitions. To have Apteryx create a custom sniffer definition for you, a Customization Request may be submitted.

- **New Definition** - Creates a new application sniffer entry.
- **Edit Definition** - Edits a selected application sniffer entry. Entries are selected by clicking on them with the left mouse button. For more information, please refer to the Sniffer Window Entry Dialog section of this documentation.
- **Delete Definition** - Deletes the selected application sniffer entry. Entries are selected by clicking on them with the left mouse button.
- **Reset** - Resets the application sniffer entries to the application defaults.
- **Definition Test** - Tests the selected definition against all open applications.

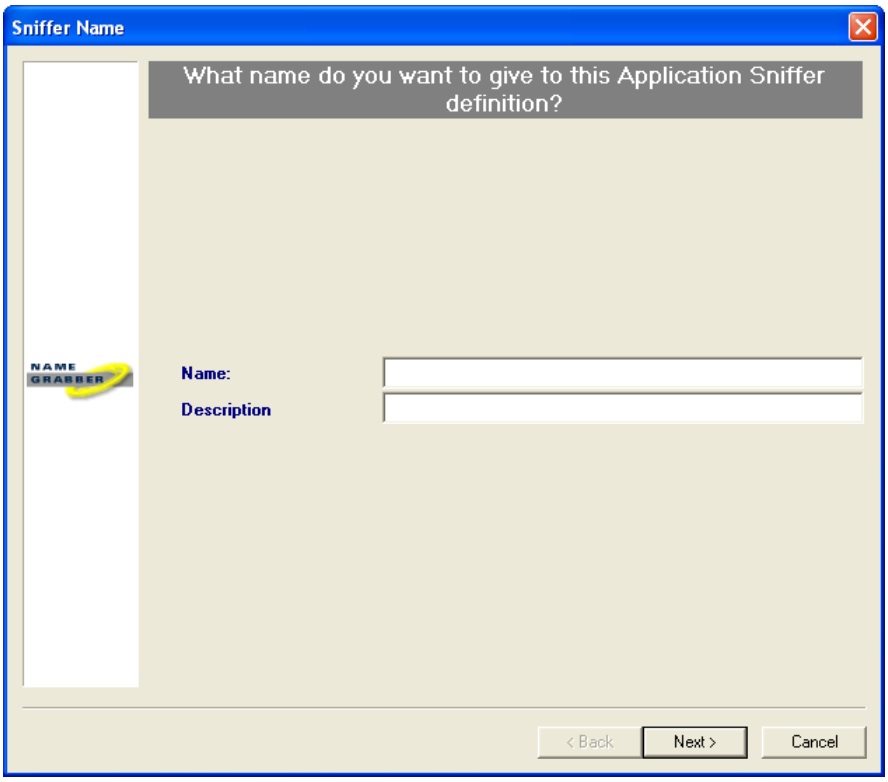
7.2 Creating a Sniffer Definition

7.2.1 Right-click on the Name Grabber™ icon in the system tray and select ***Customize > Application Sniffer Definitions***.

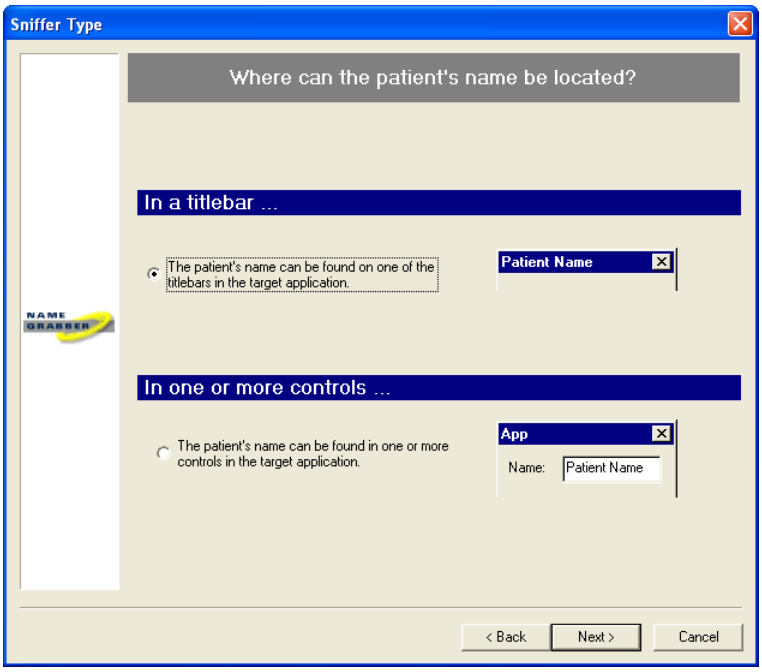
7.2.2 The 'Sniffer Window Definitions' dialog box appears. Select **New Definition**.


Sniffer Window Definitions
New Definition
Adds a new sniffer definition.
Edit Definition
Deletes the selected sniffer definition.
Delete Definition
Deletes the selected sniffer definition.
Reset
Resets the sniffer definitions to the application defaults.
Name
Main/Child Window
App Text Search
ABELDent Main Window ABELDent
ACE Dental Child Window ACE Dental
ACE Dental Child Window ACE Dental Softw
ACE Dental Check Out Child Window ACE Dental Softw
AltaPoint Child Window AltaPoint
AVI Mark MC: Main Window Client Information Di
AVI Mark MC: Main Window Client Information Dis
BridgeIT Main Window Patient Editor - [
Centricity Patient Registration Main Window Patient Registrati
Computer Age Dentist Main Window Computer Age Der
Cornerstone Patient File Child Window Cornerstone
Definition Test
OK

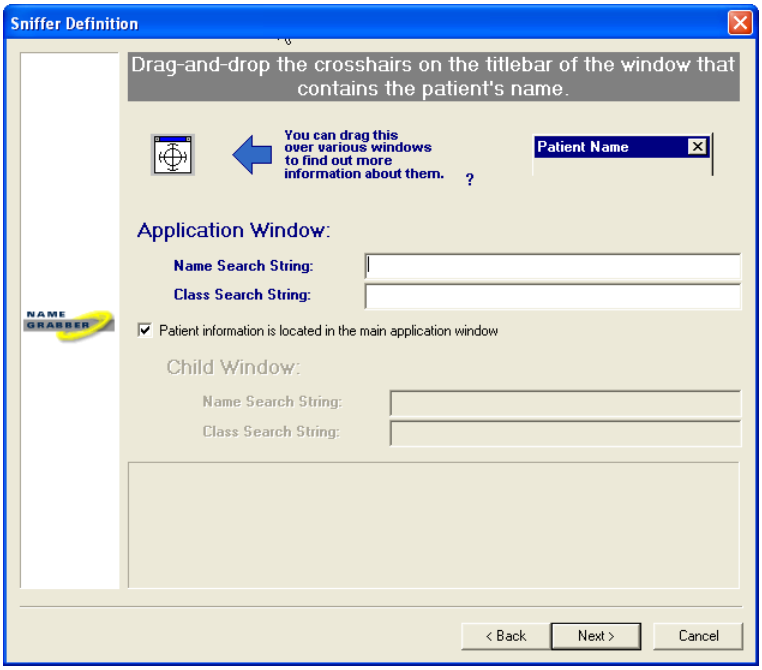
7.2.3 The 'Sniffer Name window' appears. Enter an appropriate **Name** and **Description** in the provided fields for the sniffer definition being created. Click **Next** to continue.



7.2.4 The ‘Sniffer Type’ window appears. Define where patient information can be found in the practice management application and then click **Next**.


Sniffer Type
Where can the patient's name be located?
In a titlebar ...
The patient's name can be found on one of the titlebars in the target application.
Patient Name
In one or more controls ...
The patient's name can be found in one or more controls in the target application.
App
Name:
Patient Name
< Back
Next >
Cancel

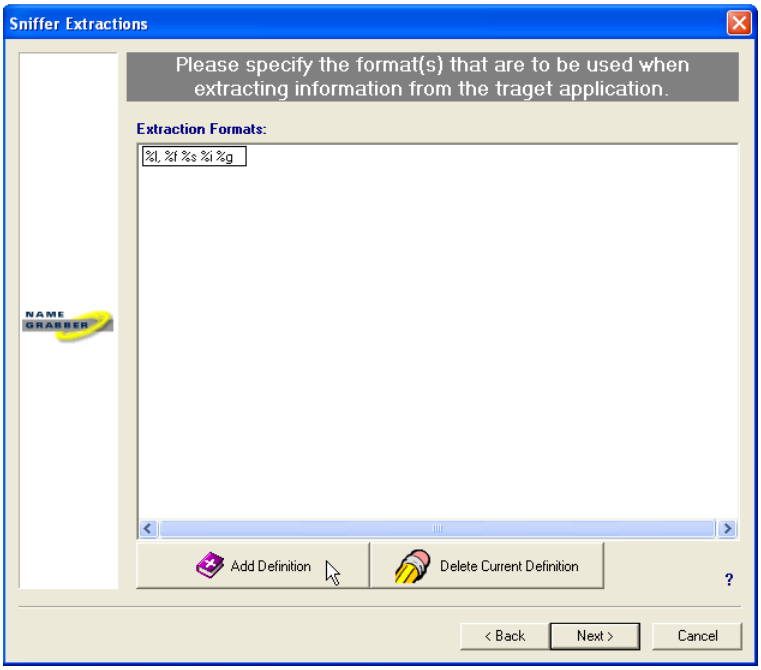
7.2.5 The ‘Sniffer Definition’ window appears. Drag the Window pull crosshairs overtop of the practice management application window or child window containing patient information. The ‘Application Window’ and, if applicable, ‘Child Window’ fields (Name and Class Search Strings) will be auto-populated with information that assists Name Grabber in identify the PM application and window to search for when trying to find patient names. Click **Next** to continue.


Sniffer Definition
Drag-and-drop the crosshairs on the titlebar of the window that contains the patient's name.
You can drag this over various windows to find out more information about them.
Patient Name
Application Window:
Name Search String:
Class Search String:
Patient information is located in the main application window
Child Window:
Name Search String:
Class Search String:
< Back
Next >
Cancel

Patient and practice information is sometimes extracted by Name Grabber™ and included in the Application and Child Window Name and Class search string. This unique information should

be removed, leaving only the Application name (if present) in the title bar of the practice management software. For example, given an application title bar of "Dentrix Chart - Bob Smith", the search string should be edited to specify just "Dentrix Chart "

7.2.6 If patient information is specified to be found in the practice management title bar (refer to 7.2.4), the 'Sniffer Extraction' window displays.



7.2.6.1 Click on the **Add Definition** button and specify the extraction format in the field provided. This format is based off of the information contained in the practice management field.

- %f - patient's first name
- %l - patient's last name
- %i – patient's ID number
- %s - patient's SS number (formatted)
- %u - patient's SS number (unformatted)
- %d - patient's date-of-birth
- %n - patient's name (first last)
- %p - patient's name (last, first)
- %x - discardable string of characters
- %c - discardable single character
- %g – the rest of the string is garbage (can only appear at the end of an entry)

Examples:

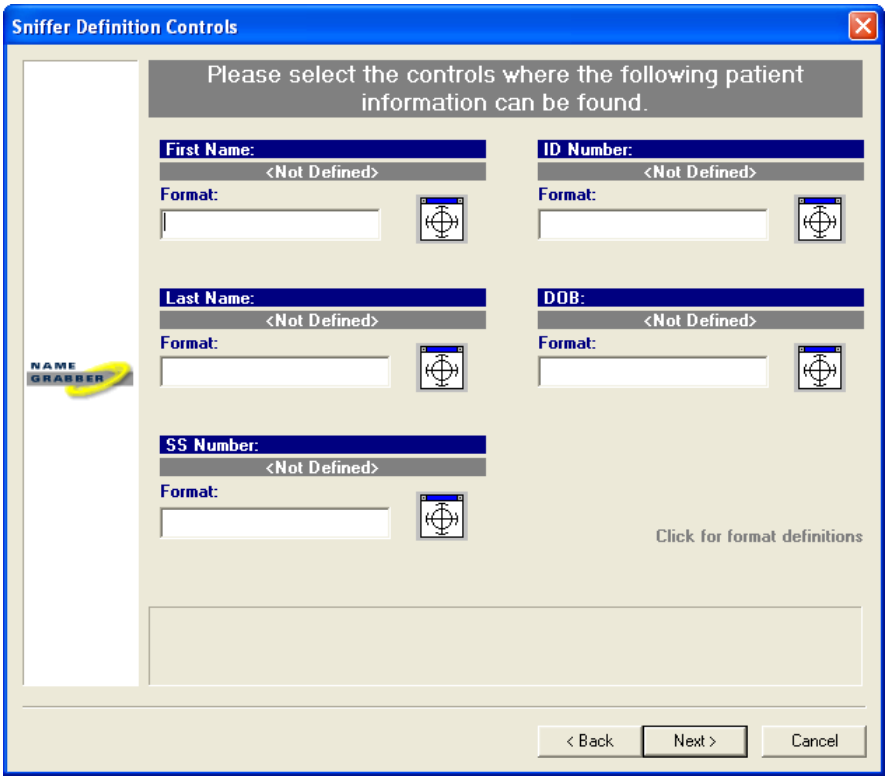
PM Title Bar Entry	Corresponding Extraction Format
(John Doe)[DDS]	(%f %l)%g -or- (%n)%g
Doe, John M. - DDS	%l, %f - %g -or- %p -%g
(Doe, John M.)	(%l, %f) -or- (%p)
John Doe (1234)	%f %l (%i)%g -or- %n (%i)%g

7.2.6.2 Additional definitions may be added to accommodate the variety of ways a patient name may be displayed in the title bar. For example, some patient records may include a middle initial that must be captured as part of the first name while others don't.

7.2.6.3 When Name Grabber™ searches for windows matching the specified formats, it will use the first matching format in the list. For this reason, entries should be ordered from most complex to least. For example, "Dentrix Chart - %f %c. %l" should be listed above "Dentrix Chart - %f %l". Otherwise, a patient's middle initial would be incorrectly appended to the beginning of their last name. Use Window drag-and-drop feature to reorder the list from most complex to least.

7.2.6.4 Click on **Next** to continue. (Skip to 7.2.8.)

7.2.7 If patient information is specified to be found in one or more controls (refer to 7.4.4), the Sniffer Definition Controls' specification window displays.



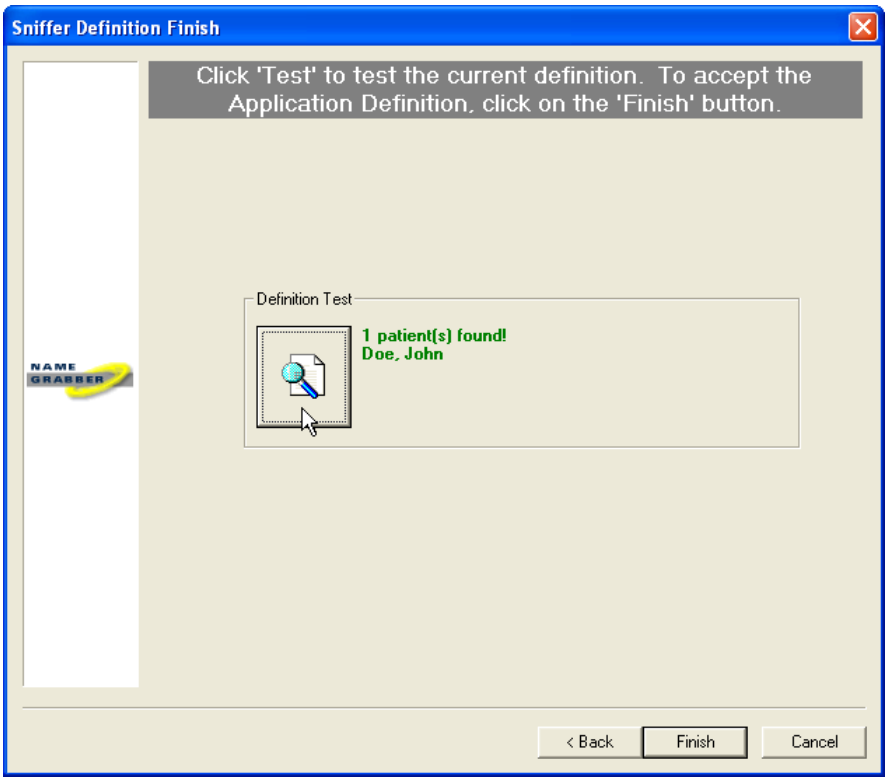
7.2.7.1 Drag the appropriate patient information crosshairs over each applicable control in the PM application to specify it's address in the PM window.

7.2.7.2 Specify the extraction format in the corresponding 'Format' field. The formatting characters are:

- %f - patient's first name
- %l - patient's last name
- %i – patient's ID number
- %s - patient's SS number (formatted)
- %u - patient's SS number (unformatted)
- %d - patient's date-of-birth

7.2.7.3 Click **Next** to continue.

7.2.8 The ‘Sniffer Definition Finish’ window displays. Use the **Definition Test** button to ensure the sniffer definition functions properly. If configured properly, the patient name of the record opened in the practice management application will display.



7.2.9 Click **Finish** when done to exit the wizard.

8 APPENDIX B: OPERABILITY IN REMOTE ACCESS ENVIRONMENTS

8.1 Overview

8.1.1 Name Grabber™ 2.1 build 10 adds the ability to bridge patient information through Remote Desktop Protocol (RDP) sessions. It will also work with other remote access utilities, such as Citrix, if the remote session's CLIENTNAME environment variable matches the local computer name.

8.1.2 This functionality is useful for customers who have Practice Management (PM) software only running inside a remote access window, and want to be able to connect back to their imaging software running on the local computer.

This method is only possible if the local computer is capable of running Name Grabber™ at Windows startup. This may not be possible for certain thin clients.

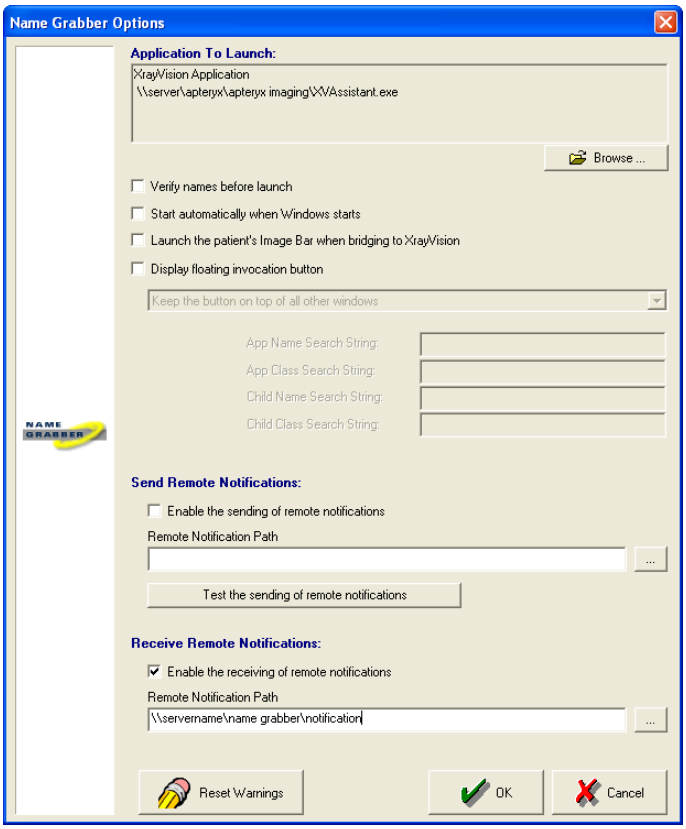
8.2 Basic Setup

The following information is approached from the perspective that Name Grabber™ is installed only on the server, and every location is launching Name Grabber™ from the same directory, however, these steps should be identical in other scenarios where Name Grabber™ is installed in various locations.

8.2.1 On each local computer, start Name Grabber™ and set it up to start automatically at Windows startup.

8.2.2 Follow the instructions below to setup Name Grabber™ on the local computers:

8.2.2.1 Right-click the Name Grabber™ icon and select **Options**. The 'Name Grabber™ Options' dialog box displays.



8.2.2.2 Select **Enable the receiving of remote notifications** under the Receive Remote Notifications section.

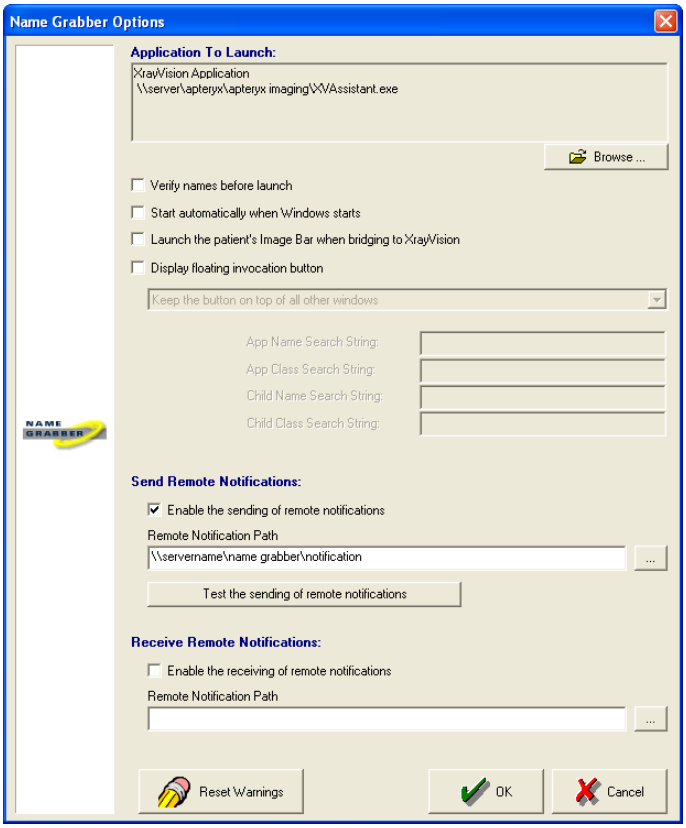
8.2.2.3 Specify a path on the server where the notifications should be communicated (e.g. ***\\server\Name Grabber\Notifications)***.

8.2.2.4 Click **OK** to save the settings on the local computer.

8.2.3 From the local computer, access the server through a remote desktop connection, start Name Grabber™, and set it up to start automatically at Windows startup.

8.2.4 Follow the steps below to set up Name Grabber™ on the remote server:

8.2.4.1 Right-click the Name Grabber™ icon and select **Options**. The 'Name Grabber™ Options' dialog box displays.



8.2.4.2 Select **Enable the sending of remote notifications** under the 'Send Remote Notifications' section.

8.2.4.3 Specify the same path in 8.2.2.3 (e.g. ***\\server\Name Grabber\Notifications***).

8.2.4.4 Click **OK** to save the settings on the remote server.

8.3 Using Name Grabber™ in a Remote Desktop Environment

Follow the steps below to invoke the bridge in a remote access environment.

8.3.1 Open the proper patient window in the PM application.

8.3.2 Click on the Name Grabber™ icon *located inside the remote desktop window*.

8.3.3 Note that the imaging software launches on the local workstation.

Technical description: Name Grabber™ will temporarily store the patient information in a text document that is named specifically after the "Client Name" value reported by Windows, which should typically be the local computer's name. Likewise, the local computer's Name Grabber™ monitors that directory for a text file containing its local computer name. When it finds the text file, it will read the patient information from the file, remove the text file, and send the patient information to the imaging software.

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